



Report to the City Council

THE MONTGOMERY ANNEXATION

AN OVERVIEW OF MUNICIPAL SERVICES, INFRASTRUCTURE AND GOVERNANCE (1986-PRESENT)

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TABLE OF CONTENTS

I. EXECUTIVE SUMMARY	1
II. BACKGROUND	3
A. PROFILE AND HISTORY OF THE MONTGOMERY AREA	3
B. ANNEXATION TO THE CITY OF CHULA VISTA	4
III. DISCUSSION.....	6
A. HISTORICAL ISSUES AND CHALLENGES WITHIN THE MONTGOMERY AREA	6
B. THE CITY’S RESPONSE TO THE ANNEXATION	6
1. What was Proposed to Change & What Actually Happened	7
⇒ Zoning and Development Issues	
⇒ Public Safety	
⇒ Social and Leisure Services	
⇒ Public Facilities	
⇒ Fiscal Issues	
⇒ Miscellaneous Issues	
⇒ Special Transition Processes	
C. FUTURE PLANS	24
VI. CONCLUSION.....	26

ATTACHMENTS

- Attachment 1: Vicinity Map
- Attachment 2: 1985 Council Position Paper
- Attachment 3: Code Enforcement Data
- Attachment 4: Southwest PAC Dissolution; Council Agenda Statement and Resolution 4/15/1997
- Attachment 5: Montgomery Planning Committee Dissolution; Ordinance 2576
- Attachment 6: Comparison of Library Services within the Montgomery Area (annexation - present)
- Attachment 7: Capital Improvement Expenditures
- Attachment 8: Public Works Operations Information
- Attachment 9: Sewer Management Chart
- Attachment 10: Citywide vs. Montgomery Area Revenue Data

I. EXECUTIVE SUMMARY

The intent of this report is to provide an introspective analysis of municipal service activity in the Montgomery area since its annexation. Specifically it is intended to provide an overview of:

1. The historical issues and challenges in the Montgomery area
2. What was proposed to change as a result of annexation
3. What initiatives and activities the City has been actively engaged in within the area since annexation, including an account of municipal services, infrastructure, and governance from 1986 to present.
4. Existing efforts and future opportunities within the Montgomery Area.

To provide an accurate accounting of City activities within the Montgomery area over the past 20 years, a team of City Departments contributed a significant amount of time and resources to complete a detailed survey of services in the area since the 1985 annexation. This report is the culmination of those coordinated efforts and is a collaborative document prepared by a team that includes the following Departments: Library, General Services, Recreation, Engineering, Public Works Operations, Planning and Building, Finance, Office of Budget and Analysis, Police, Fire, and Community Development.

This report is intended to be an informational document for workshop discussion purposes and does not require any formal action.

The Montgomery Reorganization

The 3.9-square mile area (approximately 2,500 acres) known as the Montgomery Area was annexed to Chula Vista in December 1985. (Please refer to Attachment 1 for a vicinity map of the area.) The annexation was the result of many years of discussion and compromise among numerous community and governmental stakeholders, dating as far back as 1948, and was ultimately approved by local voters at the ballot in November 1985. The Montgomery reorganization consisted of: (1) annexation of the unincorporated Montgomery area to the City, (2) dissolution of the Montgomery Fire Protection District, and (3) dissolution of the Montgomery Sanitation District. The reorganization of these jurisdictional boundaries resulted in the transfer of numerous service responsibilities and public facilities from the affected agencies to the City, including the County of San Diego (e.g., roads, street lighting, parks and recreation, police, land use planning, animal control, library, flood control, etc.), the Fire District, and the Sanitation District (wastewater services). The reorganization of these agencies and their service responsibilities into a single service provider, the City of Chula Vista, reduced confusion among local residents about services, increased service delivery efficiency and cost-effectiveness, increased local governmental accountability, and improved levels of core municipal services to area residents, most visibly police protection and traffic enforcement. In all, the Montgomery Reorganization represented a "good government" collaborative effort by local agencies and area residents to improve the quality of life for the Montgomery community.

Today, the primary outstanding concerns among City leaders and Montgomery residents are the remaining deficiencies in the area's physical infrastructure and public facilities. More specifically, the Council has asked staff to research and prepare a historical report on municipal services,

infrastructure, and governance in the Montgomery area based on the proposed changes highlighted in the 1985 *City Council Position Paper on the Proposed Montgomery Annexation* (Attachment 2).

1985 City Council Position Paper

Prior to the 1985 election, the City Council adopted a formal "Position Paper" on September 24, 1985 that proposed specific changes to municipal services, infrastructure, and governance in the Montgomery area upon annexation. The intent of the Position Paper was to provide clear and accurate information about the effects of annexation to the public. The Position Paper also established a baseline for the proposed transfer of services and facilities to the City and a framework for transitioning the community into City jurisdiction.

This report uses the 1985 Position Paper as a baseline reference and provides a detailed account of the broad range of municipal service, infrastructure, and fiscal enhancement efforts that took place in the Montgomery area in the years following annexation. While this report recognizes that there are still infrastructure deficiencies in Montgomery, it also emphasizes and reinforces the advancements that have been made, including public improvements successfully completed over the past 20 years, and the significantly increased levels of services to residents and business. The report contains detailed information on each of the service and infrastructure areas of the Position Paper and exhibits that virtually all of the proposed changes in the Position Paper have been met or exceeded. Important highlights of City efforts in the area include:

- ⇒ More than \$83 million in Capital Improvement Project expenditures
- ⇒ More than \$6.3 million in utility undergrounding projects
- ⇒ More than 100 individual street improvement projects
- ⇒ A community Recreation Facility
- ⇒ A state of the art Animal Care Facility
- ⇒ An award winning Library Facility
- ⇒ The development and adoption of the Montgomery Specific Plan
- ⇒ Telegraph Canyon Flood Control Channel improvement effort
- ⇒ Community Outreach Programs
- ⇒ Pending applications for approximately \$9.5 million of CDBG Section 108 Loans to pay for a portion of the improvements within the Montgomery area

II. BACKGROUND

A. Profile and History of the Montgomery Area

The territory known as the Montgomery area has gradually evolved over time from a farming and cattle raising area to a uniquely urbanized community and light-industrial sector. As a historically unincorporated area in the County, there was limited coordination or long-range planning of land uses in the area. Over time, the predominately agricultural area was steadily replaced in piecemeal fashion with a broad mix of commercial, industrial, and residential uses that were not always compatible or complementary to one another. Some light agricultural uses also remained resulting in a unique land use pattern and host of land use conflicts between rural and urban areas. These land use conflicts also created challenges for the logical planning and extension of public services and facilities to the area.



County General Plan

The San Diego County Regional General Plan of 1967 was the first real comprehensive land use plan that affected Montgomery. Though this comprehensive plan provided broad land use guidelines, the regional scope of the goals, policies, and objectives in the plan did not address the specific local issues and concerns of Montgomery residents and property owners within the core neighborhoods. As the Montgomery area continued to develop and evolve, a more localized and grassroots approach to addressing community issues and concerns was needed, including: urban decline, infrastructure, traffic, rehabilitation, and urban design.

Regional vs. Local

It is important to recognize that county governments, in general, are **regional** agencies structured and intended to provide core regional services to County residents, such as jails, courts, social services, public health, regional parks, and airports. As regional agencies, county governments are not ideally set up to provide core municipal-level services, such as local roads and infrastructure (e.g., curbs, gutters, sidewalks), street lighting, police and fire protection, traffic enforcement, and local parks. As a local government created to respond to local needs and issues, cities are the logical service provider for these types of municipal-level services. As rural unincorporated areas begin to develop and urbanize, annexation of these areas to adjacent cities facilitates the extension and governance of higher levels of services and infrastructure improvements to accommodate the higher-intensity uses.

At the time of annexation to Chula Vista, the Montgomery area was almost completely developed and was comprised of five identifiable neighborhoods: Castle Park, Harborside, Otay, Broderick Acres, and Woodlawn Park. In addition to the array of service and infrastructure issues in the area, the City also faced the social and emotional challenges of how to retain the local identity of the individual neighborhoods while planning for the annexation of the entire Montgomery as a new segment of the Chula Vista community.

B. Annexation to the City of Chula Vista

Prior Annexation Efforts

Discussions about annexation of the Montgomery area to the City of Chula Vista date as far back as 1948. In that span, the question of annexation was brought before the voters and failed on two separate occasions, once in 1979 and once in 1982. These annexation efforts and discussions resulted in multiple studies and analyses by policymakers and community members of the fiscal and socio-economic pros and cons of annexation, and even incorporation. It also drew significant community interest and involvement, including the active participation of the community in studying and formulating recommendations on annexation through local and County advisory committees and commissions, including the Montgomery Municipal Advisory Council (MAC). The annexation also involved affected agencies such as the County, special districts (Montgomery Fire Protection District, Montgomery Sanitation District), and LAFCO (Local Agency Formation Commission), the countywide, state-created entity that reviews and approves local government reorganizations, including annexations and incorporations.

The first time LAFCO reviewed and approved the annexation of the Montgomery area to Chula Vista was in 1978 but, as mentioned above, that reorganization effort failed to receive voter approval. In 1981, LAFCO considered two competing proposals, one for the incorporation of Montgomery as its own city, and the other for annexation of Montgomery to Chula Vista. Incorporation would have kept the Montgomery Fire Protection District ("MFPD") and Montgomery Sanitation District ("MSD") intact, and created a new city comprised of the Montgomery area. The Commission determined that incorporation was not in the best interests of local residents from both a financial and governance perspective. LAFCO approved the annexation proposal and adopted a partial sphere of influence for Chula Vista that encompassed the Montgomery area. The inclusion of territory to a city's sphere of influence is a prerequisite, or concurrent requirement, to annexation and represents the determination by LAFCO that the area should ultimately be annexed and served by that city. Although the annexation failed at the ballot, the Montgomery area remained in Chula Vista's sphere.

The 1985 Montgomery Reorganization

The 1985 annexation was the third and final annexation attempt. Initially, the City of Chula Vista proposed annexation of only 23 acres of commercial/industrial territory in Montgomery. The annexation would have transferred a significant sales tax base from the County to the City. In response, the County initiated annexation of the entire Montgomery area (3.9 square miles or 2,500 acres) to the City, which launched a series of inter-agency discussions, studies, and public outreach efforts. On July 1, 1985, LAFCO reviewed and approved the "Montgomery Reorganization," including annexation to the City and dissolution of the Fire Protection and Sanitation Districts. In preparation for the election, the City of Chula Vista adopted the *City Council Position Paper on the Proposed Montgomery Annexation* on September 24, 1985, communicating to residents the City's policies related to the potential annexation and to help residents understand the effects that annexation would have on them. Voters approved the Montgomery Reorganization at the November 5, 1985 general election with an effective date of December 31, 1985 for the annexation.

The Montgomery Planning Committee

To help facilitate the transition of the local Montgomery community into the City fold, the City Council, as part of the 1985 annexation, formed the Montgomery Planning Committee (MPC). The initial members of the MPC were formally elected by local voters on the same November 5, 1985 ballot as the annexation. The MPC served as an advisory committee to the Planning Commission and City Council on an array of issues affecting the Montgomery Area, including land use applications, budget appropriations, CIP proposals, formulation of long range goals for the area, and the development of an area plan. The MPC played an integral part in the annexation transition process and a critical role in the later 1988 adoption of the Montgomery Specific Plan. From 1986 to 1993, the MPC regularly convened once a month in public meetings and made recommendations to the City on all projects within the Montgomery area and faithfully fulfilled its roles and responsibilities to the City. In 1993, the Montgomery Planning Committee was dissolved and folded into the Southwest Project Area Committee (PAC) shortly after the adoption of the Southwest Redevelopment Project Area by the Chula Vista Redevelopment Agency. In accordance with state law, the statutory life span of a PAC is three years. In 1997, the Southwest PAC was dissolved, as well.

III. DISCUSSION

A. Historical Issues and Challenges within the Montgomery Area

As a result of county governance, indiscriminate public service distribution, and piecemeal development, the issues associated with annexation of the Montgomery area were numerous and complex. Before annexation, development of the area for many years was subject to minimal planning and zoning controls. While several residential areas developed in an organized manner, many other areas developed with conflicting land uses located adjacent to one another. The area never fully completed the transition from rural to urban land use. Many residential streets were narrow and not adequately paved. At the time of annexation it was estimated that a half of the area's streets did not have curbs, gutters, and sidewalks, some at the preference of residents. The "urban vs. rural" tradition within the Montgomery area became one of the many contentious issues of annexation. There were many residents that wanted to retain the rural character of the old unincorporated area while many others wanted to fully urbanize. The task of the City was to integrate the Montgomery area into the City while retaining the individual character of the community.

Transfer of Revenues and Service Responsibilities

The Montgomery Reorganization resulted in the transfer to the City of Chula Vista of service responsibilities and costs, and revenues to fund those services and facilities. City standards for service levels and infrastructure, however, were higher than those of the County of San Diego. The transfer of revenues to the City from the County and special districts (MFPD and MSD), therefore, did not adequately fund the costs borne by the City to extend police protection, fire protection, wastewater, street lighting, library, and other municipal-level services to Montgomery. The reorganization resulted in a negative financial impact to the City. The Council, however, held its position firmly and took a leadership role in seeking to address the growing municipal service, infrastructure, and governance needs of Montgomery area residents. The financial details for the Montgomery area are described in greater detail in later sections of this report.

B. The City's Response to the Annexation

Before annexation, many of the residents of the Montgomery area were unclear as to whether the County, the City of Chula Vista, or a special district was responsible for providing particular governmental functions such as road maintenance, law enforcement, and fire protection. Many residents considered the boundary between the City of Chula Vista and Montgomery as an artificial line in the sand and identified with Chula Vista as a single, cohesive community. Many felt that annexation to the City of Chula Vista would allow for improved public service delivery, increased local representation and interest in civic affairs, greater local control of land use, and the ability to capture a greater share of area revenues to meet community specific needs. In an effort to assist in understanding the implications of annexation, the Council adopted a Position Paper on the proposed annexation. The "Position Paper" as adopted on September 24, 1985 summarized the City's policies regarding specific service and fiscal questions related to annexation and service level changes that would result.

1. What was Proposed to Change & What Actually Happened

A REVIEW OF MUNICIPAL SERVICES, INFRASTRUCTURE, AND GOVERNANCE (1986 - PRESENT)

The 1985 Council Position Paper categorized the major service, infrastructure, and governance issues into the following key topics:

- ⇒ Zoning and Development Issues
- ⇒ Public Safety
- ⇒ Social and Leisure Services
- ⇒ Public Facilities
- ⇒ Fiscal Issues
- ⇒ Miscellaneous Issues
- ⇒ Special Transition Processes

The following sections of this report provide a detailed description of many of the City's various activities to date in the Montgomery area for each of the key service categories that were originally proposed in the 1985 Position Paper. Please refer to Attachment 2 for a copy of the complete Position Paper.

ZONING AND DEVELOPMENT ISSUES

a. Land Use -

Position Paper: County zoning regulations within the Montgomery area were to remain unchanged until new regulations and/or a specific plan were put into place. Existing legal land uses would not be discontinued or phased out as a result of annexation.

Activity To Date: In a coordinated effort with planning staff the Montgomery Planning Commission formulated the Montgomery Specific Plan. Council adopted the Montgomery Specific Plan on September 13, 1988. The Montgomery Specific Plan was to be a planning guide that was both consistent with the General Plan of the City of Chula Vista and addressed the numerous complex issues that affected the Montgomery area. The plan was to be used to help foster imaginative and orderly growth within the Montgomery area and became more of a General Plan sub-policy document rather than an implementing tool of the General Plan. As part of the Montgomery Specific Plan effort a Table of Translation was adopted that identified County to City Zone Changes. This Table identified zone classifications that could be changed. These zone changes were predicated on General Plan consistency. In light of the recent General Plan Update, these suggested County to City Zone changes can begin to be re-examined and appropriate zone changes can be implemented as part of the zoning code update. In addition, the recent update of the General Plan and the subsequent preparation of subarea plans will provide a blueprint for future development within the Southwest area. These planning efforts,

coupled with a healthy real estate market have helped renew developer interest in the Southwest portion of Chula Vista and will continue to be a catalyst for both new development and redevelopment within this same area.

b. Code Enforcement -

Position Paper: Enforcement efforts would be primarily reactive and would utilize the regulations and standards of the Zoning Ordinance of the County of San Diego. Once City zoning became effective, the City would then enforce the City standards in the area, with existing legal land uses allowed to continue.

Activity To Date: The City's overall code enforcement effort includes coordination of several different City departments and staff. In coordination with Planning, Community Development, Police and several other departments, Code Enforcement has been working diligently on establishing a program that will protect the health and safety of all residents and the value of property through the enforcement of particular codes and regulations. In addition to city departmental cooperation, Code Enforcement has elicited the opinion of business owners within the community. Code enforcement met with local representatives of the business community and together identified designated "focus" areas for enforcement efforts and a business friendly means of conducting inspections of businesses within those same areas. From field interviews with business owners, staff has been able to customize their inspection programs in order to focus attention on those types of code violations that were of highest priority for business owners within the area.

Code Enforcement Beat Program

The City's Beat Program approach to enforcement has also been very effective in the Montgomery area. The "Beat Program" assigns a code enforcement officer to a designated geographic area or "beat". This community-oriented approach has helped Code Enforcement to develop and maintain cooperative relationships within the Montgomery neighborhoods. This approach has been invaluable with respect to the Montgomery area. For effective enforcement, staff spends considerable time researching the County Zoning Code requirements that were applicable prior to the annexation. That information is a major factor in determining whether a particular use was authorized prior to the annexation. The difficulty has been that County records that were forwarded to the City often are not complete. However, in many instances the code enforcement officer is able to work with the property owner to encourage voluntary compliance.

Since the completion of the annexation, most of the code enforcement activity in the Montgomery area has been reactive or in response to specific complaints from residents and local businesses. A review of our records from 1993 through 2005 indicates that our Code Enforcement staff has investigated 4,362 code enforcement cases in the Montgomery annexation area. The annual number of cases has averaged about 440 over the last five years. This number represents approximately 25% of the total number of code enforcement cases processed throughout the City. (Attachment 3)

Community Programs

The Code Enforcement Section has also engaged in a number of proactive community based programs that have enhanced the quality of life in the Montgomery area. Since annexation, several *Community Appearance Programs* have been conducted in the area. Code Enforcement staff worked with the neighborhoods to establish neighborhood improvement committees and helped to fix up and clean up their neighborhoods. Hundreds of tons of trash and debris were removed during these "neighbor helping neighbor" programs. These efforts not only resulted in improved physical appearance of these neighborhoods but the number of code enforcement complaints also dropped dramatically as code enforcement established a positive presence within the community and neighbors developed a greater understanding of City Code requirements. Vehicle abatement is another program that has been embraced by the Montgomery community and has contributed to the improved physical appearance of the Montgomery area.

Vehicle Abatement

Code Enforcement has had an ongoing vehicle abatement program that has averaged over 1,000 vehicles removed per year Citywide. An estimated 40% of these abandoned or inoperable vehicles were removed from locations in the Montgomery area. Approximately 95% of these vehicles are removed voluntarily as a result of our notification process.

c. Housing Rehabilitation Program (CHIP) -

Position Paper: The City's CHIP program would be extended to include the Montgomery area.

Activity To Date: The City of Chula Vista Housing Improvement Program has provided home improvement funds to qualifying low-income families throughout Chula Vista since 1977. The CHIP program is comprised of two separate programs, the grant program and the loan program. Both funding programs assist low-income homeowners in health and safety related repairs. The purpose and objectives of CHIP is to: eliminate health and safety hazards, remove blight, enhance the quality of the affordable housing stock, enhance overall neighborhood quality, and provide low-income residents with a funding source to implement needed repairs to their homes.

d. Establishment of a Redevelopment Project Area -

Position Paper: It was mutually agreed upon between the County and the City that a Redevelopment Project Area would not be established within the Montgomery area for at least four years after annexation. Redevelopment efforts would require broad community support and a joint public/private sector effort.

Activity To Date: The Southwest Redevelopment Project Area, which is contained within the 3.5 mile boundary of the Montgomery community, was established in 1990, more than four (4) years after annexation. That same year, pursuant to California Redevelopment Law, the Southwest Project Area Committee (SWPAC) was formed by Council resolution. The responsibility of the

SWPAC was to review all discretionary land use projects, excluding variances, pursuant to the Southwest Redevelopment Plan and the Montgomery Specific Plan. The primary role of the SWPAC was to evaluate projects brought before them in terms of overall land use appropriateness, general economic impact, and related planning and zoning issues.

Dissolution of the Southwest PAC

In 1993, in response to permit streamlining recommendations by the Economic Development Commission (EDC), the Redevelopment Agency adopted revised "roles and functions" for the Southwest Project Area Committee. This revised roles and functions included consolidation considerations for the SWPAC and the Montgomery Planning Committee.

The number and variety of complex issues, concerns and interests in the Southwest made it difficult to attain centralized and focused goals and objectives that are typical in community planning efforts. In addition, participation of the Committee members had greatly diminished which often times resulted in an inability to establish a quorum and longer development processing timeframes. Therefore, in 1997 in an effort to better serve both the business and residential community, the City Council and the Redevelopment Agency, by joint Resolution 18624 (Agency Resolution 1536), dissolved the Southwest Project Area Committee and established the Planning Commission as the recommending body for projects located in the Southwest Redevelopment Project Area. (Attachment 4)

e. The Montgomery Planning Committee -

Position Paper: The MPC would be established to function as an advisory body to the Planning Commission and City Council on land use issues within the area and would be an integral part of developing a community plan for the area.

Activity to Date: The Montgomery Planning Committee (MPC) was established and the initial members were elected as part of the municipal election that was held November 5, 1985. The first meeting of the MPC was held on Thursday November, 21, 1985. The MPC was an integral part in the transition of the Montgomery area to Chula Vista. The MPC reviewed and made recommendations to the Planning Commission and City Council on all projects within the Montgomery area. The Committee met once per month and was the first step of public review in most discretionary projects within the Montgomery area. In addition, the MPC was an instrumental part of the development of the Montgomery Specific Plan.

As part of a City-wide initiative, the Economic Development Commission (EDC) established a subcommittee to develop recommendations on how to streamline the City's development review process. One of the many recommendations of the subcommittee was to limit the review authority of the Montgomery Planning Committee to legislative changes to the Montgomery Specific Plan and to eventually phase the Committee into the Southwest Redevelopment Committee. The recommendation was made in order to alleviate unnecessary review and duplication of efforts in the project review process, which translated into unnecessary staff time and costs, as well as unnecessary time and costs to the public.

On November 9, 1993 the Redevelopment Agency approved Ordinance 2576, which dissolved the Montgomery Planning Committee and directed the Southwest PAC to consider to seat the

remaining MPC members. As mentioned above the Southwest PAC was dissolved in 1997. As a result, all land use matters that were once under the authority of the Montgomery Planning Committee are now under the authority of the Planning Commission. (Attachment 5)

PUBLIC SAFETY

a. Police Protection -

Position Paper: the area's police service would be brought up to a level commensurate with that provided in the rest of the City. It was anticipated that there would be at least 25 additional City positions as a result of annexation.

Activity To Date: Review of the 1986/87 Police Department Budget shows that **27** positions were added in direct response to the annexation of Montgomery. The positions related to the annexation in 1987 alone were:

- 14** Peace Officers - Patrol
- 4** Police Agents – Investigations
- 2** Community Service Officers - Patrol
- 2** Communications Officers - Patrol
- 1** Evidence Technician – Admin Services
- 1** Animal Control Officer – Animal Control
- 1** Police Information Systems Specialist - Records
- 1** Secretary I - Investigations
- 1** Clerk II

Since 1987, 150 Peace Officers and 87 other additional positions have been added to the department. Subsequent to the FY 1987 budget, staffing for the Montgomery area has been based upon the City wide staffing model. This model examines the total calls for service throughout the entire City and determines appropriate staffing levels on a city-wide basis. Specific crime data is then analyzed to determine the ultimate placements of patrol personnel.

However, it should be noted that there are up to 4 officers on patrol in the Montgomery area during each shift. Support personnel such as Community Service Officers and Parking Enforcement Officers also provide support to the area, but are not necessarily allocated specifically to the Montgomery area. Previous to the annexation, the San Diego County Sheriff only provided a maximum of two units to patrol the same area.

Community Outreach

As is the case with the community at large, the Chula Vista Police Department maintains strong bonds with the residents in the Montgomery area. Community level programs, such as "Street Team", whose focus is on street level narcotics and gang enforcement, has helped strengthen police presence within Chula Vista neighborhoods including the Montgomery area. Annexation has provided Montgomery residents a full service municipal police

department only a couple of miles from their homes. Whereas, prior to annexation the sheriff's department provided police service on more of an "as needed" basis. For example, prior to annexation the Sheriff's Office did not have a motor unit dedicated to traffic and accident investigation. The City has a traffic unit dedicated to respond to all significant traffic accidents and provides traffic enforcement on a regular basis. Based upon data of last year, 25% of all traffic citations in the City were written in the Montgomery area and about 33% of all accidents were within the Montgomery area. Based upon the City's traffic unit data, staff estimates that traffic enforcement and accident investigation has most likely increased in the Montgomery area since annexation.

Special Enforcement Programs

Another significant special enforcement program that has had positive implications for the Montgomery area is Operation Safe Neighborhood. Over the last year alone, City Council has appropriated \$500,000 in overtime to support the special enforcement operation focuses enforcement on western Chula Vista.

To obtain specific crime data for the Montgomery area today would require extensive analytical work and because records for the Montgomery area are incomplete it would be difficult to compare with data prior to the annexation. However, generally speaking crime rates for the City of Chula Vista have decreased significantly since 1985, from 61 crimes per 1000 population to 39 crimes per 1000 population. Therefore, one could surmise from this that crime levels in the Montgomery area have fallen as well.

As discussed above, increased staffing levels and specialized enforcement programs within the City has provided a positive impact on levels of police service within the Montgomery area. Though direct comparisons to the level of service provided by the Sheriff's Department can not be quantified, municipal level police service usually exceeds that provided on a county wide level. The City of Chula Vista Police department is committed to providing the highest level of customer service to all citizens of Chula Vista. This is reflected in the most recent Police Department Resident Opinion Survey, which showed residents in the sector which includes the Montgomery annexation, rated the department very high in their satisfaction rate (87% overall satisfaction).

b. Fire Protection -

Position Paper: the City will assume responsibility for fire protection in the area and will continue to operate the existing fire station on Oxford Street.

Activity To Date: The 1985 reorganization of the Montgomery Area involved the dissolution of the Montgomery Fire Protection District ("MFPD") Upon annexation, the City assumed all fire protection responsibilities in the Montgomery Area previously held by MFPD. The Oxford Fire Station still operates and is currently staffed with the three-person configuration that was the standard for engine companies at the time.

16 additional city positions were added as part of the Montgomery Annexation. These positions are as follows:

- 1 Battalion Chief
- 5 Fire Captains
- 5 Fire Engineers
- 4 Firefighters
- 1 Secretary

Additionally, since the Montgomery Annexation the Fire Department has added **70.5** new positions in the following areas:

- 43** additional positions in the Calls for Service Line of Business including (3) Battalion Chiefs, (15) Captains, (13) Engineers and (12) Firefighters to staff the opening of 3 additional stations and to staff an additional truck company and a heavy rescue truck.
- 6** additional positions in the Fire Prevention Bureau including (1) Fire Prevention Engineer, (1) Public Education Specialist, and (4) Fire Inspectors.
- 11** additional positions, (1) Fire Communications Manager, (2) Fire Dispatcher Supervisors, and (8) Fire Dispatchers for the opening of the Fire Communications Dispatch Center.
- 2** (net) positions in order to formalize the department's training program (2) Fire Engineers and (1) Fire Captain less (1) Battalion Chief.
- 8.5** positions in Administration in order to establish a command and an administrative support structure.

The Montgomery community has benefited from the enhanced staffing and resources that have been added to the fire prevention bureau overall. These resource enhancements allow the direct provision of services to the residential and business community including: investigation, community development, code enforcement and education.

c. Animal Control -

Position Paper: The City will provide the same level of animal control service provided to all Chula Vista residents, including patrol service and use of the animal shelter located on Otay Valley Road.

Activity To Date: The City provides several services with respect to animal control, dog licensing, enforcement of animal ordinances, animal adoptions, intake and care of stray and owner relinquished animals, public safety and other community resources such as responsible pet ownership programs, on-site low cost rabies and microchip services, community outreach services with school programs, and programs for boy and girl scouts, and visits to local senior centers with pets, and a joint effort with SNAP (spay and neuter action project), a San Diego based 501 c 3 organization dedicated to providing low-cost spay/neuter services to area residents.

The Chula Vista Animal Care Facility

The Chula Vista Animal Care Facility (CVACF) is located within the "Montgomery area", at 130 Beyer Blvd. The current CVACF site was completed and occupied on 10/22/02. It is located on 1.7 acres, and currently houses an average of 340 stray and owner-relinquished animals daily. The CVACF consists of a state of the art veterinary medical suite with a full-time

veterinarian on staff, heated kennels and a modern, low-stress cattery. The facility has approximately 50 volunteers, largely from the Chula Vista area.

Patrol Service

On any given day, 1 to 2 officers are on duty in the 91911 Montgomery area to respond to calls and patrol the neighborhood, including the 6 parks located in the area. Currently, the Montgomery area accounts for over 50% of our licensed dog population (4,105 currently licensed dogs).

Future Plans

Future plans may include the creation of the first dog-park in the Montgomery area, proposed to be located adjacent to the CVACF. The recent creation of a 501 c fundraising organization to help promote CVACF programs H.E.A.R.T. (Help and Education for Animal Responsibility Team) will help raise funds to create this park and other projects to help the pets of Chula Vista.

SOCIAL AND LEISURE SERVICES

a. Library Service -

Position Paper: No change was expected in the near term after annexation. The Montgomery area would be included in the City's comprehensive facilities study, which will examine on-going community needs regarding library services.

Activity To Date: After the Montgomery Annexation the City of Chula Vista contracted with the San Diego County Library to continue to provide library services until an appropriate long-term plan for library services was prepared. The City contracted with the County for library service from January 1, 1986 to June 30, 1989 at a cost of approximately \$59,800 a year. During that time period, the County operated the two small branch libraries – Castle Park and Woodlawn Park.

In 1986, the Library conducted a City-wide Master Plan for library services, which identified the need for a larger facility to serve the population in the Montgomery Area. The plan said, "that the branch libraries now operated by the San Diego County Public Library are not of adequate size and poorly located to serve a broad population".

On July 1, 1989, the City of Chula Vista took over operations of these two small branch libraries. During this budget cycle, the city appropriated \$225,000 for the purchase of new library materials for the two branches since the County had removed their collection at the end of the contract. However, both the Castle Park and Woodlawn Park branches continued to have small staff and were open limited hours. (Attachment 6)

South Chula Vista Library Branch

Based on the Master Plan, in 1990 the Chula Vista Public Library applied for a grant from the California Library Construction and Renovation Bond Act (Proposition 85) for the construction of a new library facility for the Montgomery Area.

In 1991, the Library received a \$6.7 million grant from the California Library Construction and Renovation Bond Act to begin construction of the South Chula Vista Library. On April 8, 1995, the 37,000 square foot South Chula Vista Library was opened to the public. The branch holds a collection of 175,000 volumes, which includes, an extensive Spanish language collection, a state of the art computer lab, a full service Literacy Center, two community meeting rooms and study rooms. In addition, the branch offers ESL classes, computer classes, research databases in English and Spanish, extensive children's programming, story times, adult and family cultural programs, teen programs, summer reading programs and year round reading programs for children and teens. Both the Castle Park and Woodlawn Park branches were closed as a result of the opening of the full service South Chula Vista Branch.

In 2005, \$450,000.00 was spent on renovating the South Chula Vista Branch Library. The renovation included conversion to the marketplace model, lighting improvements, signage improvements, exterior painting, fountain repairs, floor repairs and roof repairs. The award winning library is a great asset to the Montgomery area and the community at large.

After School Programs

In addition, in FY 98/99 the Library, in partnership with the Chula Vista Elementary School District, assumed responsibility for the creation and supervision of after school programs for Chula Vista elementary school students. That year, the Library's Educational Services Division launched "STRETCH" (Safe Time for Recreation, Enrichment and Tutoring for Children) and "DASH" (Dynamic After School Hours). The South Chula Vista Branch Library serves as the administrative headquarters for both the STRETCH and DASH programs.

STRETCH

STRETCH, an award winning literacy and arts enrichment program, began serving 60 children per day and has since grown to serve 100 children per day. STRETCH is currently offered at seven Title I schools all in the Montgomery Area (Harborside, Lauderbach, Loma Verde, Montgomery, Mueller, Otay and Rice). Each site is staffed by a Site Coordinator (.5 FTE), and five hourly Youth Leaders. STRETCH targets children who have been identified by their teachers as at risk of academic failure, (often due to limited English language and/or literacy skills), and is designed to provide them with the academic and social "boost" they need to succeed. Each year the evaluation data received from teachers, parents and students indicate that the program is highly successful in improving English language and reading skills, boosting students' confidence and social skills, and improving their academic performance overall. Parents rave about the academic and social support that STRETCH provides their children, and express their gratitude that the program is free. The program runs every school day for 3.25 hours from school dismissal.

DASH

DASH, consists of a structured activities for approximately 50 children and two DASH Leaders at each site. The program offers sports clinics, arts and crafts and cooperative games. DASH is offered at two Montgomery Area schools (Kellogg and Palomar).

The cost to operate STRETCH and DASH programs in FY 05/06 serving the Montgomery Area is approximately \$839,506. It is funded by a combination of City general funds, Chula Vista Elementary School District general funds, and State of California after school grant funds.

b. Recreation Services -

Position Paper: Expansion of existing programs provided at the Laurderbach Community were anticipated as well as the City's afterschool playground programs would extended to included the Lauderbach and Montgomery elementary schools.

Activity To Date: Recreation Services provided within the Montgomery area have significantly increased since annexation. Upon annexation, previously existing programs were expanded and both new services and facilities have been established. Prior to annexation the primary recreation resource for the community was the Lauderbach Community Center. Upon annexation 2.91 FTE staff were added to operate the facility. Hours were expanded, more classes were offered, a game room was added, and community use and facility rentals increased. In addition, the City recognized that there was a need for more community youth activity facilities in the area and western Chula Vista at large. Therefore, the City began efforts to establish a youth center. In 1988 the City and Sweetwater Union High School District entered into a 40 year ground lease agreement and the Chula Vista Community Youth Center was built in March 1992. The facility is used, operated and maintained jointly by the City and the Sweetwater Union High School District. Residents of the Castle Park and Harborside neighborhoods benefit substantially from this Youth Center.

Community Partnerships

The City of Chula Vista Recreation Department works in partnership and collaboration with community, non-profits, schools, and human service organizations to assess and provide programs and services that reflect community needs and are jointly funded. For example, the Otay Elementary School is a Healthy Start school and partners with the Otay Community Center in providing community-wide programs and services. The Otay Community Center, located at Main Street and Albany, is also a direct result of community and city efforts.

As early as 1992, staff began to hold meetings with residents of the Otay area, including Montgomery, to determine what recreation programs would benefit them as a community. There was overwhelming support for a gymnasium and community center and in March 2000, the Otay Community Center was opened. The center is approximately 14,000 square feet in overall size with a 9,000 square foot gymnasium, fitness center, lobby with game room, and associated office space. An additional 1,300 square foot classroom will be constructed in the next year to provide for additional programming opportunities.

After-School Playground Programs

As anticipated, upon annexation, two after-school playground programs were established at Montgomery and Lauderbach elementary schools. Each after-school program was staffed by a .33 FTE Recreation Leader and .10 FTE Recreation Aide. Administration and oversight of the elementary after-school program transferred to the Educational Services Division of the Library Department in 1998. In addition, the Recreation Department provides after school programs for middle school children at the City's six middle schools. One of the middle schools, Castle Park, is in the Montgomery area. The program provides a safe haven for our youth and provides an atmosphere where learning, teamwork, fitness, and fun are emphasized and encouraged. Activities include homework assistance, arts and crafts, special events such as dance programs, sports, and an exercise fitness program.

The Recreation Department is committed to providing community services with activities that promote community health and well being for the citizens of Chula Vista. These activities are diverse recreational, social, educational and cultural programs provided in community facilities and school campuses. The Department will continue to work in partnership and collaboration with community, non-profits, schools, and human service organizations to assess and provide programs and services that reflect community needs and are jointly funded.

Mobile Recreation Program

In addition, the Department will start a new citywide Mobile Recreation Program in the near future. This Mobile unit will bring free recreation programs to the community community, into neighborhood parks and other locations that are not close to recreation centers, to provide safe and fun activities, and to establish a more visible City presence. The focus will be in Western Chula Vista where large segments of the population, especially in older parts of Chula Vista, are underserved, as they are not able to easily access recreational facilities or afford the cost of recreational classes. Activities are planned that will include, arts and crafts, traditional games, recreational team sports, special events and activities that will foster creativity, emphasize fair play and sharing, learning the value of teamwork and fitness. This program will provide safe opportunities for children to have fun and interact with other neighborhood children their age. Harborside Park, Los Ninos Park, Valle Lindo Park, and Hilltop Park are all potential locations. Two of these parks – Harborside and Los Ninos – serve Montgomery area residents.

c. Park Service -

Position Paper: Existing parks would be maintained. The City would also strive to increase the park acreage ratio to the City standard of 2.0 acres per thousand population.

Activity To Date: Since annexation park service has increased within the Montgomery area. The City Of Chula Vista has a vision to provide much needed parkland on the west side of the City, and has adopted the Western Chula Vista Infrastructure Financing Program, a multi-million dollar effort to improve and increase the amount of parkland in the older communities west of Interstate 805. Such efforts include Harborside Park, the first park to be built on the west side of the City since 1979. Although Harborside Park is located just outside of the Montgomery area boundary,

this park will serve many residents of the Montgomery area. The 5.21 acre park is designed to serve members of the community residing within at least a ½ - ¾ mile radius and was designed to create a park that would welcome the community by making a visitor feel welcome and embraced by the park, while at the same time maximizing the recreational use opportunities for community residents.

Otay Valley Regional Park

Another park effort that has had a positive impact on the Montgomery area is the Otay Valley Regional Park. The tri-jurisdictional Otay Valley Regional Park planning effort began in 1990 through the establishment of a joint exercise of powers agreement. This agreement established an organizational structure aimed at maximizing citizen input while planning for a regional park. The first decade of planning included securing grant funds for the acquisition of open space, resulting in the public ownership of over 800 acres of regional parkland. Aside from the acquisition of land, several important planning documents have been adopted or completed. A Concept Plan for the park was prepared and adopted in 2001 by the City of Chula Vista, the City of San Diego, and the County of San Diego. Other accomplishments include on-going clean-up efforts within the park, including the removal of 1,100 tons of debris, preparation of park design standards and guidelines, a natural resource management plan, a habitat restoration plan, trail guidelines and construction drawings for the development of a system of trails and staging areas within the I-5 to I-805 segment of the Otay River Valley. Through the trail system, this regional park has helped provide connectivity between western Chula Vista and eastern Chula Vista, as well as the region as a whole.

PUBLIC FACILITIES

a. Revenue Appropriation -

Position Paper: The City would work with the Montgomery Planning Committee to establish a multi-year phased capital improvement program aimed at upgrading public facilities such as curbs, gutters, sidewalks, roads, drainage systems, and parks. The City anticipated spending three to five times as much as the County did on annual capital improvements, with the program anticipated to exceed \$12 million in capital improvements. For at least ten (10) years after annexation the City Council would not form an assessment district in the Montgomery area for street improvements such as curbs, gutters, sidewalks or pavement unless property owners representing at least two-thirds of the area supported such a formation.

Activity To Date: As was proposed in the Council Position paper the City worked with the Montgomery Planning Committee to identify public facilities and services needs within the Montgomery area. To date, most of those recommendations have been provided. Since annexation the City has spent approximately \$83.1 million on capital improvement projects in the Montgomery area. Adjusting for inflation of 3% per year since 1986, the amount spent on CIP's in the Montgomery area is more than triple the \$12 million anticipated in the Council Position Paper. Although the City has undertaken many capital improvement projects, it is recognized that there are still many areas with deficiencies. Through a combination of CIP and annual rehabilitation programs, the City will continue to address the deficiencies.

Street Improvements and Rehabilitation Projects

Like most areas of the City, the majority of the projects within the Montgomery area were related to street improvements. The number of individual/site specific projects total well over one hundred (100). In addition to these projects, the Montgomery area has also seen a substantial share of the City's varied annual rehabilitation projects. These projects include pavement rehabilitation, sidewalk rehabilitation, installation of ADA accessible curb ramps, sewer rehabilitation and corrugated metal pipe (CMP) rehabilitation. No assessment districts were formed in the Montgomery area in the ten years following annexation to fund such improvements.

Major Projects

In addition to the street related capital projects, the City has also undertaken significant other efforts that have directly benefited the residents of the Montgomery area. These efforts include the construction of the South Chula Vista Library (\$14+ million), the Otay Recreation Center (\$2.5+ million), the Animal Care Facility (\$3.5+ million), Harborside Park (\$4+ million) and the Telegraph Canyon Flood Control Channel (\$5+ million). Though Otay Recreation Center and Harborside Park are not technically located within the annexed area, in both cases, they are surrounded by and directly serve properties within the annexed area. The detailed breakdown by Project type and total expenditure of funds on capital projects in the Montgomery area is provided in Attachment 7.

Please note on Attachment 7 that annual expenditures for capital projects by fiscal year since 2000 and combined the years from **the annexation** through 1999 have been provided as a single column. The reason for this is that the City's current fiscal management/accounting system dates back to 2000. Information prior to 2000 is only available in archived storage files that were not readily available for this report.

b. Street Maintenance -

Position Paper: The Montgomery area would be included in the City's existing surface treatment program as well as in the synchronized traffic signal system.

Activity To Date: Street maintenance services were extended to the Montgomery area after annexation. The current Street Maintenance Program provides asphalt and concrete structure (streets, sidewalks, curbs and gutters) maintenance, and litter removal and trash abatement services to the public so they can have a safe, clean, and functional right-of-ways. From calendar years 2000-2005, Public Works Operations spent a total of \$440,403 (includes labor, materials & equipment) for street related tasks such as potholes, street reconstructions, etc. General Services provides most of the major street repairs, such as slurry seals and resurfacing or pavement overlays, through construction contracts. (Attachment 8)

Street Costs for the Montgomery Area By Year	
2000	\$35,024
2001	\$67,443
2002	\$100,801
2003	\$53,231
2004	\$75,569
2005	\$108,335
Total:	\$440,403

Chip Seal Program

Though the previous "Chip Seal" program is no longer in effect, the Montgomery area is included in the City's annual pavement rehabilitation program. That program typically involves a number of surface treatments including chip seal. The amounts of streets done every year are a function of that year's funding levels. The streets included in each year's program are developed from lists based on visual inspection, complaint records and maintenance records. Most of the major streets (Main Street, Fourth Avenue, Broadway, Palomar Street) have received far more than chip seals. In some cases, those streets have been completely reconstructed. The current street surface maintenance program provides a more complete and regular review of street maintenance than the "Chip Seal" program that was in effect at the time of annexation.

c. Street Sweeping -

Position Paper: The same level of service would be applied to the Montgomery area as is provided to the rest of the City of Chula Vista.

Activity To Date: Prior to annexation, the County did not provide any regularly scheduled street sweeping services for the Montgomery Area. The City currently has a contract with Cannon Pacific Services to provide street sweeping services at a cost of \$201,968 per year (citywide). The agreement covers the sweeping of all City public streets (that have been accepted by the City), center islands/medians, centerlines, and designated parking lots. Residential streets are swept once per month. Business streets, such as Fourth Avenue and H Street, are swept once per week. Center islands, medians and centerlines, located on major streets, are swept twice per month. Non-curbed streets are swept once per month. Parking lots are swept once per month. Special sweeping is done on an as-needed basis, such as sweeping after a special event, paid at an hourly rate as indicated in the agreement. (Attachment 8)

b. Tree Program -

Position Paper: The city would trim all street and park trees on a regular basis.

Activity To Date: Prior to annexation, the County did not provide any regularly scheduled tree trimming services for the Montgomery Area. The City's street tree program provides tree trimming, reforestation, and preservation services to the community so they can enjoy the benefits of trees that are healthy, safe and growing in public areas. From calendar years 2000-2005, Public Works Operations spent a total of \$111,615 (includes labor, materials & equipment) for City staff plus \$10,295 for contract services for tree trimming services for the Montgomery area alone. Note that most of the Montgomery Area is not heavily forested, with the exception of the quadrant between Fifth and Industrial, from L Street to Naples.

In addition, the City has participated in the People for Trees Program. This program provides free trees to residents in an effort to save energy and money, improve air quality, improve neighborhood appearance, and reduced storm run-off. Through this program, over 100 trees have been provided to residents in the Montgomery area alone.

c. Storm Drain Construction -

Position Paper: Storm drain construction would be accelerated, drainage maintenance improved, and flooding potential decreased. A comprehensive drainage plan would be developed for the area. The City anticipated that the City would contribute approximately \$4 million to the Telegraph Canyon Channel improvement effort.

Activity To Date: City efforts have been committed to improving storm drain construction, drainage maintenance and decreasing flooding potential within the Montgomery area, as well as the City overall. Approximately 10% of the Drainage Master Plan total expenditures have been spent within the Montgomery area. To date there have been 29 drainage improvement projects within the Montgomery area and approximately \$5.7 million has been spent on the Telegraph Canyon Channel improvement effort. (Refer back to Attachment 7)

d. Montgomery Sewer District and Sewer Fees -

Position Paper: the Montgomery Sewer District would be dissolved and there would be no change in regular sewer service charges immediately after annexation. The sewer connection fee would be reduced from \$1,000 to \$300 per SFD. Once Montgomery Sewer District reserves were depleted, the City could review sewer service in the Montgomery area, including sewer connection charges and could establish new charges that reflected the maintenance costs and charges for the City-wide system.

Activity to Date: The City assumed responsibility for providing sewer service to the Montgomery area on July 1, 1986. As anticipated in the 1985 Council Position report, there was "no change in regular sewer service charges for the near future," with Montgomery area residents experiencing no change in sewer rates until FY 1989 and then continuing to pay a reduced rate as compared to the rest of the City until FY 1993.

Following annexation, Montgomery Sewer District reserves were placed in a separate account and used to maintain and benefit the existing Montgomery sewer system. For a period of time, the City of Chula Vista maintained a distinction between the Montgomery Area and the Pre-Annexation Chula Vista Area. Each area had distinct funds from which revenues were accrued and expenditures were made. (Attachment 9 shows the adjustments in greater detail).

Sewer Management

In 1993, the City of Chula Vista resolved to eliminate the distinction between Montgomery Annexation Area and pre-annexation City of Chula Vista areas and treat both areas of the City the same way. Council adopted Resolution 1993-17143 approving the adoption of the final budget for the City of Chula Vista for FY 93/94. The resolution further authorized the Finance Director to merge the Montgomery Sewer Service Revenue Fund into the Sewer Service Revenue Fund and merge the Montgomery Sewer Replacement Fund into the Sewer Facilities Replacement Fund. Since the bulk of the City's Sewer Service Revenue expenditure is primarily used to pay the City of San Diego for wastewater treatment, and since the City of San Diego makes no distinction between the flows generated in the Montgomery Area and the rest of the City, merging of these funds increased administrative efficiency.

e. Street Lighting District -

Position Paper: The area will be removed from the Special Street Light District and residents and businesses would no longer be required to pay a special street lighting fee.

Activity to Date: Upon annexation, the area was removed from the Special Street Light District and by FY 1987 residents and businesses were relieved of the \$185,000 paid through a special street lighting fee. The City of Chula Vista has assumed full responsibility for street lighting. Beginning in 1991, there has been \$6,374,000 spent in utility undergrounding projects. This total does not include associated street improvements. (Attachment 9)

On the capital side, there have been 24 traffic related projects within the Montgomery area. These projects are made up principally of traffic signal installations, modifications, upgrades or street light installation.

FISCAL ISSUES

a. Taxes and Fees -

Position Paper: Neither taxes nor fees would significantly change for Montgomery Residents in the City compared to the County.

Activity To Date: The City Council Position paper provided a chart that compared taxes and fees in the County and in the City. This chart showed that with respect to taxes and fees the County and City were very similar overall. The City's very small bonded indebtedness listed in the Council Position paper was paid off in 1990.

b. Area Revenues -

Position Paper: Revenues generated in the Montgomery area would be spent to provide the same level of municipal services as the rest of the city, and to provide for an extensive capital improvement program to upgrade public facilities in the area.

Activity To Date: Although it is very difficult to accurately quantify the City's actual operating costs in the Montgomery area, staff believes that the City spends more in operating cost per capita in the Montgomery area than in the overall City. As indicated in Attachment 10, per capita City revenues from the Montgomery area are lower than for the overall City. Thus staff believes that the City spends more in the Montgomery area than it receives in revenue from the area. Prior to annexation, the County is thought to have spent less in the Montgomery area than it received in revenue from the area.

As discussed within the public facilities section a significant amount of capital improvement funds have been used within the Montgomery area to upgrade public facilities and infrastructure.

MISCELLANEOUS

a. Trash Service -

Position Paper: Trash service would remain at the existing level. At such time feasible, the City would try to renegotiate the existing trash collection fee to the same rate paid by Chula Vista residents.

Activity To Date: The City provides a full service Recycling and Conservation Program. Services include: trash (solid waste) hauling & recycling services, and household hazardous waste disposal. The City has worked to accomplish franchise agreements for these services that maximize service quality and reduce cost, provide printed and/or electronic public information on services available and respond efficiently and effectively to consumer inquiries no later than the next business day.

The Recycling and Conservation Program staff also promote and implement environmentally sustainable practices for City facilities, programs and the community. Staff works to identify the resources and provide the technical assistance needed to develop and maintain sustainable practices throughout the city.

b. Mobilehome Rent Mediation -

Position Paper: The City's Mobilehome Space Rent Mediation Ordinance and Mobilehome Issues Committee would extend to include Montgomery.

Activity To Date: The City of Chula Vista Mobilehome Space Rent Review Code sets up procedures which must be followed with respect to space rent increases as well as establishes the responsibilities of the Chula Vista Mobilehome Rent Review Commission. The Chula Vista Mobilehome Rent Review Commission works with both park owners and tenants to resolve disputes, provide guidance in changes of ownership and space rent matters. A large number of the City's mobilehome parks are contained within the Montgomery area. These residents directly benefit from the City's Mobilehome Space Rent Review.

c. County Flood Control District -

Position Paper: The City would assume responsibility for County flood control districts.

Activity To Date: The City has assumed responsibility for County flood service areas.

SPECIAL TRANSITION PROCESSES

a. Transition -

Position Paper: The City estimated that it would provide virtually all municipal services to the area by July 1, 1986 and anticipated that additional staff and equipment would be required. In addition one qualified member from the Montgomery area would be appointed to each of the City's twelve non-charter established advisory boards and commissions.

Activity To Date: The City took responsibility of virtually all municipal services to the Montgomery area by July 1, 1986 unless it was determined that a greater benefit to the residents would be achieved by contracting necessary services. In addition, July 1, 1986 was the effective date of the dissolution of the Montgomery Sanitation District and the transfer of wastewater services to the City. To date, all municipal level services are provided to the Montgomery area by the City of Chula Vista. As proposed in the paper, one member of the Montgomery area was initially appointed to each of the twelve advisory boards and commissions.

C. Future Plans

The recent General Plan Update utilized the policy framework of the Montgomery Specific Plan to develop the Southwest Area Plan, which comprises the subareas of Montgomery and Castle Park. With the update of the General Plan, the stage is set to proceed with a zoning code update and the development of specific plans and/or zoning that will carry out the objectives outlined within the Southwest Area of the General Plan.

The Five Planning Districts

The Southwest Planning area delineates five Planning Districts (South Third Avenue, South Broadway, Palomar Gateway, West Fairfield, and Main Street), all within the Montgomery Subarea. These five planning districts are the primary focus of the objectives and policies found in the Southwest area of the General Plan and a vision for each was developed. In addition, the Montgomery Subarea plan identifies proposals for change and improvement and provides the appropriate policies that will guide implementation of the vision for each district.

The recent update of the General Plan, subsequent preparation of specific plans, and/or rezonings and continued City service efforts are important to sustaining the Montgomery area as a community.

These efforts coupled with developer interest in that portion of the City will be the catalyst for both new development and redevelopment within the area. In addition, there are several CIP projects planned for the area that will further enhance the community as a whole.

Recently Approved Capital Improvement Projects

Some of the recently approved CIP projects include: a \$2.2 million drainage project on Emerson Street, \$ 703,470 for Castle Park Elementary sidewalks and partial street re-construction, an \$ 1,011,100 street improvement project on Tobias Dr. (Naples – Oxford), and an \$ 890,256 Dixon Dr. (Naples – Oxford) Both of these projects included the constructing of sidewalks,

pedestrian ramps, and associated driveways and driveway aprons. In addition, City Council recently authorized staff to prepare and submit an application to the United States Department of Housing and Urban Development (HUD) for a \$9.5 Million Section 108 loan to pay for a portion of the improvements within the Montgomery area.

VI. CONCLUSION

Cities commonly seek to annex territory for purposes of future development plans and/or financial gain. In the case of Montgomery, revenues transferred to the City of Chula Vista upon annexation were not, and are not, sufficient to fully fund the City's costs for increased service levels and public improvements. Annexation of the fully developed area, however, was a "good government" policy decision by all parties involved to facilitate the enhancement of municipal services, infrastructure, governance, and the overall quality of life in Montgomery.

To serve the Montgomery area after annexation, this City increased staffing in its core service departments, increased budgeting and expenditures for key services and facilities in the area, and initiated a host of capital improvement projects to begin a long-term effort to improve the area's ailing infrastructure. The previous sections of this report provide a detail account of these various activities and clearly exhibit the public benefits that annexation provided to Montgomery residents. This report also clearly recognizes that significant infrastructure deficiencies continue to exist today, and that future plans and the City Council's ongoing commitment to serving the Southwest will be the key to successfully addressing those deficiencies.